PeopleSoft Introduction to FINANCIALS v8.9

Basic Navigation

Training Guide

Basic Navigation

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Using PeopleSoft's Browser-Based Application

Working in the PeopleSoft Internet Architecture is similar to browsing web pages.

PeopleSoft applications are made up of a navigational structure, components (groups of pages), and pages. Using these elements, you can enter new data or change, delete, and modify the existing data in your application. Working the PeopleSoft Internet Architecture is similar to browsing web pages and it is a simple, intuitive way of working with your database.

Terminology

The following table describes some of the basic elements used in PeopleSoft Internet Architecture. Each item in this table will be described in greater detail in later sections of this document.

PIA	**P**eopleSoft **I**nternet **A**rchitecture
Home	A button in the universal navigation header which returns you to your homepage.
Menu Pagelet	The PeopleSoft navigation structure, located on the left side of your screen. The menu pagelet contains links to content references, enabling access to transaction pages. Links display in a hierarchical format. Menu items can expand or contract, depending on content
Add to Favorites	Favorites allow you to create your own list of bookmarks to folders and content references.
Search	A search engine integrated with the PeopleSoft Internet Architecture that allows you to search for any registered content references.
Universal Navigation Header	The header area in the PeopleSoft Internet Architecture that remains static as you navigate through the pages. The navigation header contains the following links: Home (homepage), Add to Favorites, Sign out and Search.
Component	A group of related pages that pertain to a specific task. Components, which you access from the left hand navigation, contain tabs with each containing a related page.

Page	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.
Keys	The display-only fields that uniquely identify your data. To display a page, enter the keys so that the system can retrieve the correct row of data.

Logging into PeopleSoft

To log in to a PeopleSoft application:

1. Open your default browser window.

    Enter the URL for your application, or select the bookmark for the page where you want to work.

2. The Sign In page appears.

3. Enter your **User ID** and **Password.**
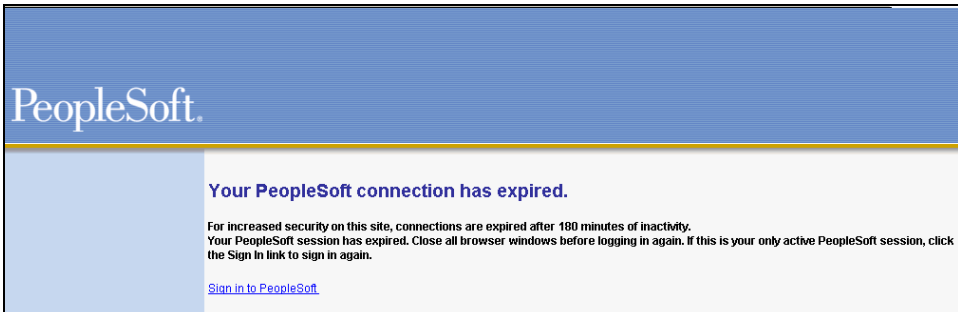
    Your user ID and password are case sensitive.

4. Tab to or click the **Sign In** button to log in.

    After you log in, the mouse pointer turns into a small hourglass, signifying that the online system is issuing Structured Query Language (SQL) statements to initiate your request. Whenever the system accesses data in the database, the hourglass appears on your desktop. If the login information you entered is valid, the system displays the homepage for your PeopleSoft system.
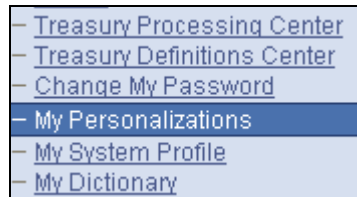
    For security purposes, your PeopleSoft system automatically logs you off from your application after a certain period of time of inactivity (determined by your security administrator). To return to your application, click the **Return to PeopleSoft 8 Sign In** link. The sign in page appears, and you can once again log in to your application.

My Personalization

Use the My Personalization page to access and customize personalization's, such as collapsing the Menu Pagelet automatically, or tab over certain types of fields/buttons.

1. Select My Personalization's from the menu.

General Options	Offers options for user accessibility features, the length of time the system holds a page in cache, multi language settings, and the spell check dictionary. If you require support for assistive technologies, such as screen readers, you can change the accessibility options. For Multi Language Entry, on pages where multiple language entry is available, you can choose to enter data in the language that you specify in the Data Language drop-down list box. On this page you can also reset your foreign language dictionary to use a different language for your spell checker.
Regional Settings	Select to personalize your date, time, and number formats. Select settings for afternoon and morning designators (AM/PM or am/pm), date format (MM/DD/YY, DD/MM/YY, or YY/MM/DD), a local time

zone, and so on.

Navigation Personalization's	Offers options that allow you to tab over certain unused fields on a page. This means that if you frequently press the tab key to move around your page, you can skip page elements that you know you will not need to access. For example, you might always prefer to type the date into a date field and then press the tab key to move quickly to the next field rather than opening the calendar prompt, selecting the date, and then closing the prompt. By selecting the Tab over Calendar icon, when you press tab to navigate around your page, your cursor focus never rests on a calendar icon

Note. Changes to Personalization settings require you to log off and log back on in order to take effect.

2. Click the Personalize Option button for the category that you want.

Each of the personalization pages lists the personalization option, the default value for that option, and an Override Value drop-down list box where you can select a new value to replace the default. Click the Explain link at the end of each row for an explanation of the corresponding option.

Personalization Explanations

The Personalization Explanation page offers the details for that particular setting. You can select the override value on this page or restore the option to its default value

General Options

Option Category: General Options			
Personalizations		Find First ◄ 1-4 of 4 ► Last	
Personalization Option	**Default Value**	**Override Value**	
Accessibility Features	Accessibility features off	▼	Explain
Time page held in cache	900		Explain
Multi Language Entry	No	▼	Explain
Spell Check Dictionary	Use session language	▼	Explain
Restore Category Defaults			
OK Cancel			

Regional Settings

SpearMC
management consulting

Option Category: Regional Settings

Personalizations   Find First ◄ 1 of 1 ► Last

Personalization Option	Default Value	Override Value	
Afternoon designator (PM, pm)	PM		Explain

Restore Category Defaults

OK   Cancel

Navigation Settings

Option Category: Navigation Personalizations

Personalizations   Find First ◄ 1-11 of 11 ► Last

Personalization Option	Default Value	Override Value	
Tab over Add/Del Buttons (+/-)	No	Yes	Explain
Automatic menu collapse	No	No	Explain
Tab over Calendar Button	No	Yes	Explain
Tab over Grid Tabs	No	Yes	Explain
Tab over Header Icons	No	Yes	Explain
Tab over Lookup Button	No	Yes	Explain
Tab over Navigation Bar	No	Yes	Explain
Tab over Browser Elements	No	Yes	Explain
Tab over Page Links	No		Explain
Tab over Related Page Links	No		Explain
Tab over Toolbar	No	No	Explain

Restore Category Defaults

OK   Cancel

3. Click **OK** after a setting has been changed. The system will acknowledge the change with the following message:

Save Confirm

✔ Your Personalizations have been saved.

Return

👉 Changes made in the My Personalization settings require you to log off and log back on in order for the new settings to take affect.

4. Click **Return**. The system will return you back to the Personalization's page.

Navigating in PeopleSoft

Using the Menu Pagelet

The PeopleSoft browser-based interface provides an intuitive way of updating or viewing data in your database. Navigation using the **menu pagelet** consists of a hierarchy of folders and content references. Expanding and collapsing these folders are the primary means of getting around your PeopleSoft application.

☞ Hyperlinks are the lowest level in the navigation hierarchy and appear as blue, underlined text. Click on the hyperlink to open the appropriate component.
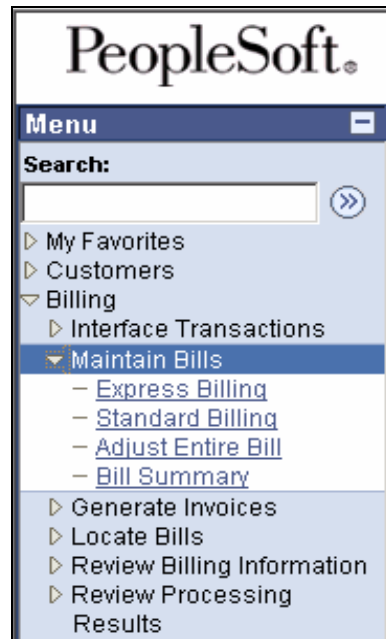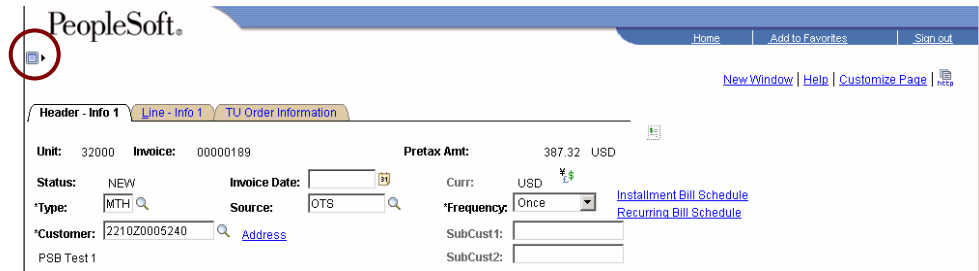
The left arrow (▷) denotes that the Folder is completely collapsed. The down arrow (▽) denotes that the Folder is completely expanded. The content identified in blue underline (hyperlink) is the lowest level of the hierarchy. Click on the hyperlink to activate the corresponding component.

The left hand navigation menu can also be hidden in order to allow for a larger amount of the page to be viewed. To hide the Menu Pagelet, click on minimize button (▬) at the top right corner of the menu.

☞ Click on the minimize button (▬) to hide the Menu Pagelet. Click on the unhide Menu Pagelet button (▤▸) to view the Menu Pagelet.
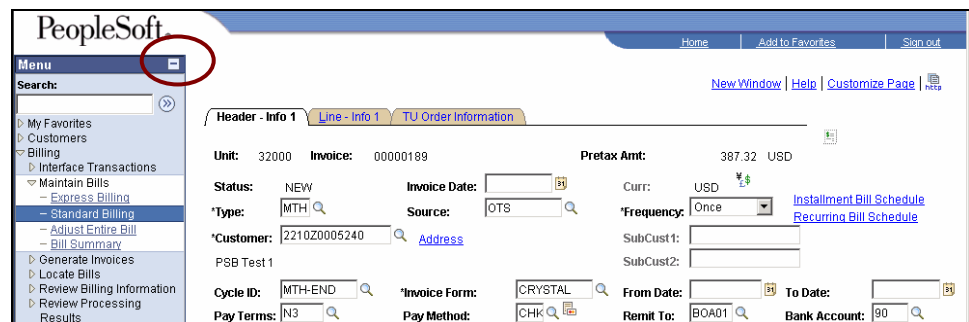
To view the left hand navigation menu again, click on the unhide button (⊞▸) at the top left corner of the page.

Using the Menu Pagelet Search Feature

The Search field is located at the top of the Menu Pagelet. Use the Search field to search for a registered content reference within the system.

👉 Use the Menu Pagelet Search functionality to help you find a specific content or reference.

Enter the name of the page you want to find and press Enter or click the search button. This action opens the Search page displaying the results.

If your search produces a large number of results, modify your search criteria and select the Search Within Results option, then Find to narrow your search further. Use the Customize Settings link to hide or show summaries of each search result and to control the number of search results to appear on each page.

Using Navigation Pages

In addition to the menu pagelet, PeopleSoft applications may include **navigation pages**, which serve as alternatives to the menu pagelet. These navigation pages provide a user-friendly navigation tool in the form of task-driven pages that provide intuitive access to pages needed to complete your business processes.

You access navigation pages by clicking a folder in the menu pagelet. Elements embedded in the folder, including content references and other folders, are arranged in a graphical format on a navigation page displayed to the right of the menu pagelet.

Universal Navigation Header

In addition to the Menu Pagelet and Navigation Pages, the PeopleSoft Internet Architecture also has a universal navigation header. It includes Home, Worklist, MultiChannel Console, Add to Favorites, and Signout. This header will appear at the top of every page as long as you are signed on.

Home	Click to return to your homepage.
Worklist	Click to access the Worklist page, which provides summary information about all items on your personal worklist. This page also provides links enabling you to view additional details about the work, perform the indicated work, and reassign work items.
MultiChannel Console	Enables users defined as agents in PeopleSoft MultiChannel Framework to access and manage tasks assigned to them. This is an optional setting that your system administrator enables. If you do not have access to this feature, the system displays a warning message indicating this.
Add to Favorites	Click to add a page to your favorites list for easy accessibility. Favorites enable you to create your own list of bookmarks to components and transaction pages. Once you add a favorite, it is maintained under the My Favorites folder in the menu. Expand the My Favorites folder and click the link that you want to view.
Sign out	Click to sign out of the application and return to the Sign In page.

Important! For security purposes it is important that you sign out when you are finished with your PeopleSoft session rather than simply closing the browser